



DHCS Guide for Calculating MAGI Medi-Cal Individual Household Size

Household Size Flow Chart

Based on § 435.603(f) of the final Medicaid regulations.

Instructions:

- ✓ Person-based; Complete for each individual since there could be different household sizes within same applicant family.
- ✓ Use Key Characteristics Table and Household Diagram Worksheets on next two pages to prepare for this flow chart

START HERE

Go to #1

#1 - Does the individual expect to file a federal tax return for the taxable year?

If No Go to #2

If Yes Go to #3

#2 - Does the individual expect to be claimed as a tax dependent by a taxfiler for the taxable year? If No

Go to Box C, NonFiler Rules then to #7

If Yes Go to #4

#3 - Does the individual expect to be claimed as a tax dependent by another taxfiler for the taxable year?

If No Go to Box A, TaxFiler Rules, then to #5

If Yes Go to #4

#4 - Is the tax dependent:

1. Someone other than the spouse or child (biological, adopted, or step; minor or adult) of the taxfiler.
2. Under the age of 19 or under 21 if a full time student who expects to be claimed as a tax dependent and is living with both parents but whose parents do not expect to file a joint tax return.
3. Under age 19 or under age 21 if full time student and the taxfiler is the individual's non-custodial parent.

If No to all three, Go to Box B, Tax Dependent Rules then to #5

If Yes to any of the above, Go to Box C, Non-Filer Rules, then to #7



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Box A, TaxFiler Rules – * Household size consists of the individual and all persons whom such individual expects to claim as a tax dependent.

***Household size = Total number of persons counted in household composition.**

Box B, Tax Dependent Rules - * Household size consists of individual and the taxfiler and all other persons whom the taxfiler expects to claim as a tax dependent.

*** Household size = Total number of persons counted**

Box C, Non-Filer Rules - Household size consists of the individual plus the following people living with the individual:

- Individual's spouse;
- Individual's children under age 19 (natural, adopted and step), or if full-time student, under age 21;
- For individuals under age 19, or if full-time student, under age 21:
 - Individual's parents (natural, adopted and step); and
 - Individual's siblings under age 19 (natural, adopted and step), or if full-time student, under age 21

Household size = 1 + total number of people listed above living with the individual.

#5 - Is the individual married?

If No Go to #7

If Yes Go to #6

#6 - Are the individual and spouse living apart and filing separately?

If No Add spouse to household size

If Yes Go to #7



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#7 - Is the individual pregnant?

If No Go to #8

If Yes Add number of children expected to Household size

#8 - Are any people who are included in the individual's household composition pregnant (not counting the individual)?

If No -- Stop --No Additional Changes

If Yes Add Number of Children Expected to the Household size for each pregnant person.

*** If a State verifies household composition and a taxfiler cannot reasonably establish that another individual is a tax dependent of the taxfiler for the tax year in which Medicaid is sought, the inclusion of such individual in the household of the taxfiler is determined by the non-filer rules listed above**



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Key Characteristics Table

Instructions:

- ✓ Using Information for each household/family member, capture key characteristics in the table below.
- ✓ Use this table of characteristics to walk through the flow on the page above to arrive at a resultant Household Member Set and Family Size in the last column of the table

#	Household Member	Tax Filer?	Tax Dpdnt of #	Excep 1? **	Excep 2? **	Excep 3? **	Married to #	Living with #'s	Filing with #	Pregnant?	Resultant HH Members (#'s)	HH Size
1		Y / N		Y / N	Y / N	Y / N				Y / N		
2		Y / N		Y / N	Y / N	Y / N				Y / N		
3		Y / N		Y / N	Y / N	Y / N				Y / N		
4		Y / N		Y / N	Y / N	Y / N				Y / N		
5		Y / N		Y / N	Y / N	Y / N				Y / N		
6		Y / N		Y / N	Y / N	Y / N				Y / N		
7		Y / N		Y / N	Y / N	Y / N				Y / N		
8		Y / N		Y / N	Y / N	Y / N				Y / N		
9		Y / N		Y / N	Y / N	Y / N				Y / N		
10		Y / N		Y / N	Y / N	Y / N				Y / N		

** Exceptions Defined:

1. Someone other than the spouse or child (biological, adopted, or step; minor or adult) of the taxfiler.
2. Under the age of 19 or under 21 if a full time student who expects to be claimed as a tax dependent and is **living** with both parents but whose parents do not expect to file a joint tax return.
3. Under age 19 or under age 21 if full time student and the taxfiler is the individual's non-custodial parent.



Household Diagram Worksheets

Instructions:

- ✓ Using Information for each household member to first capture the Household Diagram for all individuals on an application.
- ✓ Use the other drawing boxes to illustrate, for each individual, the household diagram for each individual. Use a copy this page for more than 8 household members.

<p>Application Household Diagram</p>	<p>_____ Tax filer Household Diagram</p>	<p>_____ Individual Household Diagram</p>
<p>_____ Individual Household Diagram</p>	<p>_____ Individual Household Diagram</p>	<p>_____ Individual Household Diagram</p>
<p>_____ Individual Household Diagram</p>	<p>_____ Individual Household Diagram</p>	<p>_____ Individual Household Diagram</p>